Strategic Management Alignment Initiative

DRAFT
Workbook

Purpose of the Initiative

Setting the Context:

1. What were the reasons that prompted this initiative?

2. What are the benefits that CLIENT will gain from the completion of this initiative?

3. What are the benefits that we, and our teams, will gain from the completion of this project?

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Strategic Component

> *What is the overall vision of CLIENT? Why was CLIENT created? What value is the CLIENT going to provide?*

Rationale:
- It is important that the CLIENT has a valid and consistent understanding of its overall vision and an understanding of how that vision drives the work that we are delivering.
- It is important for CLIENT employees and customers to understand the "business" we are in and the true value we are delivering.
- The more we understand about "why" we are doing what we are doing, the more meaning we will derive from our work, the more pride we will feel in our accomplishments and the better our product will be.

CLIENT Vision:

The vision statement is a lofty stretch goal. It is neither tactical nor operational and does not have a number in it. It defines value and identity.

This information is readily available to you from our various Web pages, internal documents and other presentations.

CLIENT Vision

> **What are the Strategic Priorities of CLIENT? How do the strategic priorities align with the CLIENT vision?**

Rationale;

- Knowing the vision is the first step. Understanding the priorities that come out of that vision is essential.
- What are the three or four ambitions that the CLIENT is trying to accomplish under the vision

Each one of these priorities is usually attached to a department or business unit for them to implement. The way we are implementing those strategic priorities is called a strategy and each of you have a series of strategies that you use to do your work.

CLIENT Strategic Priorities

The Strategic Priorities for **CLIENT** are (not your business function – remain at the CLIENT level)

CLIENT Strategic Priorities:

Operational Component

What is the operational mandate of each specific business / functional unit? How aligned is it with the overall vision of CLIENT?

Rationale: (we are now at the operational level so its all about YOU)
- The mandate is actually the operationalization of the vision for each functional group/business unit.
- Gaining clarity of the mandate of each business unit will give meaning to everyone's work and will promote the value that your unit creates.
- Without an accurate and acceptable mandate (purpose) there may be ambiguity around strategic priorities or what we will actually spend our time doing. This may contribute to the lack of prioritization and lack of focus of activities and a culture of "responding to everything" without discrimination. It forces you into the Urgent and Important category.
- In a sense, this is about organizational clarity

Once we know what our strategic priorities are (what the CLIENT mandate demands of us), we can make some statements around our operational mandate (business unit vision), or what we need to do to satisfy those demands.

How does each of you define what you need to accomplish? Essentially, what is the vision of each functional group? What value do you create? Make sure that it aligns with the overall CLIENT vision.

Operational Component

What are the Strategic Priorities of each business unit?

Rationale;
- *Strategic priorities are what each of the business units' have decided was their 3-4 most important goals and objectives; their primary focus; required to fulfill its mandate.*
- *It is against these priorities that each business unit will be measured and that which tells the community how effective the business units are in delivering value.*
- *This ensures that all of the work we are doing is aligned*

Each business function needs to do this work independently. After that has been completed, all units (or subset) will meet as a unified Corporate Services team to discuss and receive feedback on their work, to discuss their interrelationships and to emerge with a unified plan for what they will accomplish.

Human Capital Component

Lets now deviate a bit to move into values and expectations

> **What are the core values and expectations we have of each other that will be used to guide interpersonal behaviour, set expectations of work quality and define how we treat each other?**

Rationale;

- Values and Expectations are what guides our behavior, sets our expectations of others, defines we treat one another and creates the atmosphere or culture of our work environment. High performance teams cannot exist without them.
- "Team values" always has some controversy attached to it. CLIENT is no different.
- Usually we find that people do not have "time", do not want to make the time, or simply do not think it is of high value. In any case the result is the same; people avoid the topic.
- We are highly values centric and as our culture professionalizes it will change. We need to be in control of the change and we need to be intentional about the language we use, how we treat one another and what expectations we have of one another.

What do you think the core values should be for CLIENT. Although we will workshop this notion, it is good for you to make some notes and comments which will be referred to in a later session.

INTERNAL VALUES AND EXPECTATIONS	*EXTERNAL VALUES*
1.	*1.*
2.	*2.*
3.	*3.*
4.	*4.*
5.	*5*
6.	*6.*
7.	*7.*
8.	*8.*

Operational Component

(Now that we know _what_ we need to do, we need to determine _who_ we need to do it with)

> *Who are our stakeholders? What are their definitions of success? How well do we measure up to those definitions? How will our performance be evaluated? How can we develop better relationships with our stakeholders?*

Rationale;

- Once the mandates and priorities of the business units are clear, we as the Corporate Services Team will have a better idea of **what** we need to accomplish.
- We now need to determine **who** are the people, groups, or organizations (stakeholders) that we need to deliver to or interact with, so we can meet our objectives?
- What are these stakeholders' definitions of success? (Very important question)
- With the organizational clarity we now have, we are in a much better position to have clear, directed and focused (and confident) conversations with our stakeholders around the deliverables required for all of us to be successful.
- Our stakeholders can then ask us for stakeholder satisfaction statements and we can know how we can deliver more effectively and make our relationship better.
- Additionally, having conversations with CLIENT key stakeholders will also provide each business unit with an opportunity to understand their business, their constraints and their issues such that we can help them find better solutions.

In order to make all of this real, we may need to engage these stakeholders to actually ask the clarifying questions.

Therefore, who are the people with whom we work and need to interact with in order for us to satisfy our operational vision? At the internal level, they could be our own business unit staff. At the "next" internal level, they could become the other business units of Corporate Services. At the "next" internal level they could be others w ithin the CLIENT. At the External level, they could be other government departments.

It is very important at this stage to list them, understand exactly who they are, and what they need from us to be successful and work with them.

Doing this will ensure that we establish great relationships. We want to exceed our client's expectations. We want to help make them great.

Who are these internal and external stakeholders? What are their definitions of success? How well do we now meet those definitions and what can we do to make them better?

Define Key Stakeholders / Definitions of Success

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Tactical Component

> **What are the outputs (products and services) that we deliver to our stakeholders? How well to they meet the stakeholder outcome statements? How well will we be evaluated?**

Rationale;

- Outputs are essentially our business unit commitments to our stakeholders.
- More specifically, they are the deliverables.
- They are the measurable, tangible, direct products and services that are directly related to the outcome statements (definitions of success) that will generate a series of program activities that will, in turn, generate the deliverable.

Now that we know our client's definitions of success, we need to deliver products or services to them that fulfills that definition; that makes success real for them. What do each of the business functions deliver to their clients and (internal and external) stakeholders that meet their (and our) definitions of success?

What does your specific team need to deliver to make its stakeholders happy and want to do business with us?

Are we clear around our roles and responsibilities? Are we clear around our dependencies?

Tactical Component

> *What are the activities we are currently doing to produce those deliverables? Are their any activities that we need to stop doing, do more of or alter in some way?*

Rationale;

- Activities are the actions that produce change of some kind, be it a relationship or a deliverable in order to achieve program outcomes (degree of success) and ultimately your mandate (true value).
- Once the work on stakeholders has completed, each business unit can then clearly look at the activities that are required to produce that deliverable which will, in turn, ach9ieve that definition of success.

OK.

So now we know our client's definitions of success. And we know the products and services we are going to deliver to them that will make those definitions real.

We now have to understand and develop a list of activities and tasks that will make those products or deliver those services. What are the specific activities that you must engage in to make those promises happen?

Again, are we clear around who is responsible for what, when and how? This will essentially be our performance plans and make up the major part of our everyday work plan to which we will be held accountable.

Interestingly, my experience is that you will find a lot of the activities you are now doing will not be in that list !!!!!!

INSERT EXERCISE
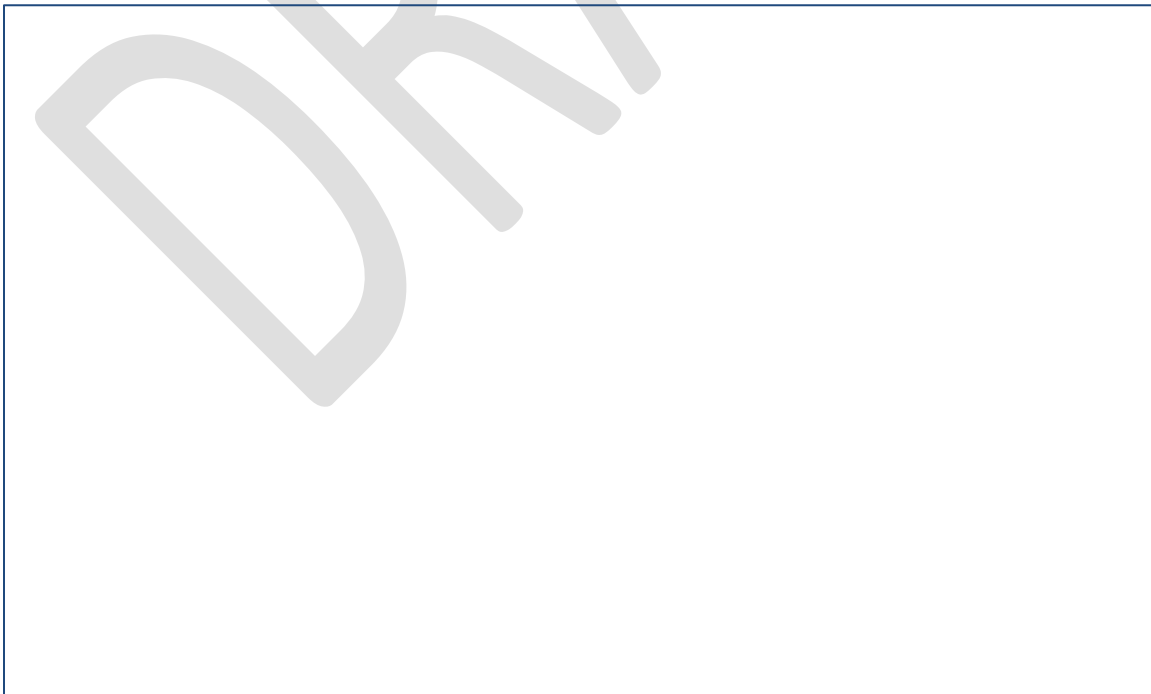
Human Capital Component

Do we have the right people, in the right roles, with the right knowledge doing the right things? How are we going to coach our people to become more effective?

Rationale:

- The issue of making sure that we have the right people with the right skills in the right jobs at the right times is always an area of controversy.
- Ensuring that we have committed resources who see their positions as "careers" as opposed to "jobs" are essential to all of our success.
- Do WE measure up to what is expected of us? It is important at this point to identify gaps so we can be proactive.
- What are the coaching and mentoring opportunities for all of us to assist where we need help?

What are the major and MUST HAVE skills and abilities that are required to activate the vision and meet the requirements of the operational mandate?

SKILL GAPS:

Enabling Component

What / who are the enablers that we need in order to make us more successful (i.e. HR, Communications, Program Evaluation, IT)

Rationale;

- All good program leaders understand that they cannot be successful on their own: that they could not possibly perform all the above activities without the support of others. This is very true of CLIENT who is a matrix organization who are dependent on one another to be successful.
- CLIENT must intentionally set out to recognize the need to secure the trust and advocacy of their enabling partners.
- Some of the key enablers ought to include Communications, Human Resources, Information Technology, and Program Evaluation

What are the enablers that we need to have that will assist us in attaining the corporate vision and operational mandate? Some of these may be Communication, Information Technology, Consultant involvement, Outsourcer Involvement, etc.